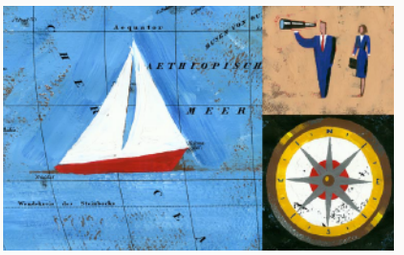
FamilyMatters™

Preserving the Family-Owned Business



2006
User's Manual

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THE BIG PICTURE

1. **Family***Matters* is designed to highlight *you*, the presenter.

2. **Family***Matters* is an educational workshop. It will help position you as the authority who understands the unique aspects of a family-owned business and all of the dynamics present in these companies.

3. Never go into any presentation with the mindset of selling some insurance product that is "in your bag This is a "consultative" sale and will require that you take time with the family.

4. The program is interactive. You can begin with any topic - in any order - so let the family choose and get them involved in *their* workshop from the beginning.

5. Navigation is simple and redundant for all five topics. Remember to rehearse...your delivery should be natural, confident and at times - conversational.

6. Customize the Welcome Screen for each and every presentation. It is important that a family recognize that the workshop has been tailored to them. Always use this feature.

7. NEVER conduct a presentation without the Quick Compass.

8. ALWAYS label your Quick Compass' withyour contact information as well as any necessary compliance disclosures. *Use blank Avery labels which you can purchase at any office supply store or on-line.* Or simply use an approved business card.

9. ALWAYS review the meaning of the Quick Compass' scores so family members can understand their individual level of risk.

10. **Family***Matters* is a powerful tool. It can be used to create and establish strategic alliances with CPAs, bankers and attorneys. In many circumstances these professionals are trusted advisors to the individuals in a family-owned business and they can be a powerful ally.

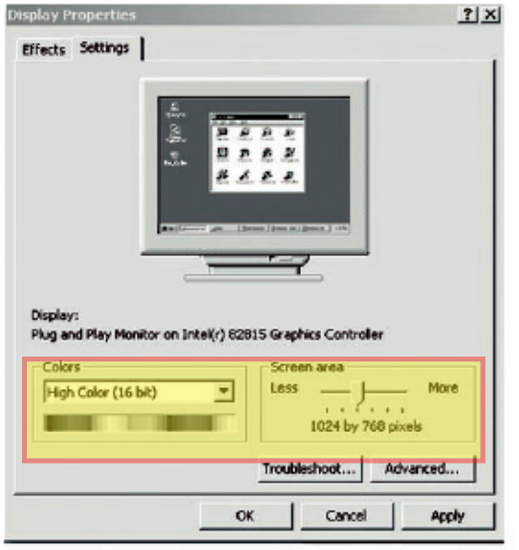
INSTALLATION

Installation is very easy. You must always keep the **Family***Matters* disc in your computer when accessing this program.

Your Computer Settings

Newer computers will be configured properly. Here's how to check your machine.

1. Go to the Start Menu
2. Choose Settings
3. Control Panel
4. Display
5. Click the Settings tab at the top of this pop-up
6. Under "Colors" it should list "High Color 16 bit" or "High Color 32 bit"
7. Under "Screen Area", slider should read 1024 X 768
8. Click "Cancel"
9. If not, select these these preferences, then "OK"
10. You will be asked if you want to accept the changes, select "Yes"



Install the Program

1. Place your **Family***Matters* disc into your computer's disc drive.
2. Click "**Start**", "**Run**", and in the dialog box type >> **D:\setup.exe** and complete the install procedure. In this example, "D" indicates the letter designation of your CD/DVD drive.
3. When completed, go to "**Start** ", select "**Programs**", "**Selling Technologies**", "**Family*Matters***."
4. You will see a dialog box; click the button indicating "**Electronic Registration**."
5. Follow the prompts, and enter your serial number (affixed to the case). Activation is automatic.
6. It may take a moment for the Registration/Activation to complete; you must have Internet access.

NOTE: When running the program, the disc **must** remain in the drive at all times

RUNNING THE PROGRAM

After you have completed the installation for the **Family***Matters* disc, you can begin.

1. Make sure the **Family***Matters* CD-Rom is in your computer
2. Go to the Start Menu
3. Select "Programs", then "Selling Technologies"
4. Then "**Family***Matters*"

It is advisable to disable any miscellaneous programs that may be running in the background, such as a screen saver, when you run the **Family***Matters* program.

The CD must remain in your disc drive at all times.

PRECAUTIONS

As with any CD or DVD...never leave your **Family***Matters* disc in direct sunlight, in a hot car or other environment where there are extremes in temperature.

If you get dirt or fingerprints on the bottom of a disc, you can wash it - gently - with mild soapy water.
Dry the disc in a circular motion with a soft towel.

AVOID scratching the bottom of the disc as this can impair performance.

Keep your **Family***Matters* disc in a safe place.

HOW TO NAVIGATE THE PROGRAM

There are three ways to navigate the program:

- Sequentially, using the Space Bar
- Sequentially, using the Arrow Key
- Selectively, mouse click on any buttons

This program is fully interactive. You can navigate to any area, in any order. Forward or backward.

The **Welcome Screen** can be customized for every presentation.

Simply press the "**E**" key on your keyboard.

Enter the new information.

Click **Finish**.

This is the **Main Interface** Screen.

There are three selections available: Intro, Profile, Topics

Selecting **Intro** will run a short video that highlights family-owned business statistics in the U.S.
Selecting **Profile** allows you to click through a series of photos with biographical information to introduce cast members to your audience; these individuals appear throughout the program.
Selecting **Topics** will advance you to the five main topics screen.

Exit button will exit you from the program.

This is the **Main Topics** Screen.

Rollover of any text will highlight that topic.

Mouse-click of the highlighted topic will start the main video.

Back Arrow button (top right) will take you to the previous screen.

At the conclusion of the main video you can select from: **What's Next**, **Consultant**, **Quick Compass**, or **Thought Balloons**.

What's Next gives you access to three follow-up video segments that reveal the best, worst and typical choices made.

Consultant will access a video for that particular module

Quick Compass takes you to the first question in the booklet related to the main topic you are presently working on.

The small pictures at the bottom allow you to hear what a family member is thinking, but not saying related to the current situation.

HOW TO NAVIGATE THE PROGRAM

Navigation for every topic is **exactly** the same, so once you understand how to move through a single topic, you will be able to navigate the entire program with ease.

When you select the **What's Next** link, you will have three choices to re-direct the action. (Let the audience pick one.)

The **Arrow** in the upper righthand corner (always) allows you to navigate back to the previous screen.

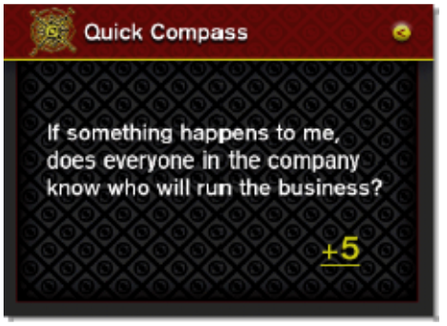
At the conclusion of that video segment, you can listen to what individuals are "thinking" clicking on the small photo's to hear the thought balloons.

By selecting the **Asterisk**, you will access the associated **Consultant** video clip commenting on this particular outcome. There are dedicated consultant videos for every family scenario.

Using the **Arrow** in the upper right hand corner you can return to the screen to access the associated Quick Compass for this section.

Click the **Quick Compass** link and you will be directed to the first question associated with this topic.

Direct the attendees to complete this section in their Quick Compass before moving on to another topic.



STEPS TO A SUCCESSFUL WORKSHOP

Inviting Family Members

When planning to invite a family-owned business, make sure you include siblings who are NOT employed in the company. All children - and perhaps - spouses should be invited. However, how many people you invite from the extended family will be a decision you should explore with the head of the family.

It is advisable to keep the setting "intimate." You may choose to work with one family at a time to help promote a free exchange of information, or plan a workshop with two or three companies. Whatever you choose, make sure it is an "audience" that is manageable. However, we strongly recommend one family for each presentation.

Inviting Non-Family Member Employees

Each situation will be different. However, in some family-owned businesses there are key employees who are not members of the family. These individuals are important to the continued success of the business and should be considered in your invitations. Candid discussions that involve family-members (only) can be scheduled for a separate time.

This same consideration usually does not apply to in-laws, but be certain to get a feel for the entire *family landscape*. It will help you in your dealings with any family member as you begin a dialog and gain their trust.

Building Your Alternative Distribution Network

There is nothing more powerful than establishing a strategic partnership with a CPA firm, bank and/or law firm. Today, every Home Office recognizes the potential of these professionals and has adopted some initiative to pursue them and their client base. And these individuals are normally trusted advisors to many family-owned businesses.

You can suggest a private presentation with the principals of these firms to acquaint them with the program and subject matter. As part of these discussions you can mention that **Family***Matters* can be instrumental in helping these organizations grow their core business.

In certain circumstances, your industry "Consultant" will be live in the meeting room, and you will not access the Consultants in the **Family***Matters* program. So plan time to rehearse how the presentation will be conducted with the partnering firm. Once a group has agreed to partner with you to conduct a workshop, discuss how invitations will be handled.

Choose the Location & Time of Day

A workshop should be held in an atmosphere that enhances the professional nature of **Family***Matters*. Consider a hotel, boardroom or other appropriate site where the lighting and sound can be controlled. A workshop along with breakfast or lunch improves attendance, and don't forget the popcorn!

TIMING OF INVITATIONS

When to Send Out Invitations

Invitations should be mailed approximately three to four weeks prior to your presentation. You may also want to consider additional options:

- Offer prospective families a choice of two different workshops in your letter. Their schedules may not allow them to attend the first, but they could attend the second.
- Have someone from your organization follow-up with those who have not responded.
- When contacting prospects, consider extending invitations to their CPA, attorney or banker.

If you are using a third-party list, always be sure your list information is accurate and up-to-date. Personalize all correspondence.

Tracking

Keep track of all responses. During the workshop, make a note of who attended, who brought guests and no-shows.

Make Confirmations

The first point of contact is very important. So when potential attendees call your office to reserve a seat at the workshop, be certain that whoever is taking reservations is prepared to answer any questions regarding the presentation, including:

- Directions
- Date of your next presentation
- General information - what to bring, what to wear, etc.
- Are guests invited? If so, who and how many
- Whether breakfast or lunch will be available
- What time to arrive

The reservations person should also confirm: company name, address, phone, fax, and e-mail. This will allow you to build a marketing database and send a confirmation/reminder. This information can also be used to generate an attendance list; you can then create tent cards for each attendee.

ESTABLISH RAPPORT & ENGAGE YOUR AUDIENCE

It is very important for families to feel comfortable at your workshop. Consider these points:

- First impressions are critical.
- Be prepared. Practice the information you are going to present.
- Be sure that the meeting space is ready before the first person walks in the door.
- Have an associate help you greet attendees, make appointments, and handle any details with the meeting space organizers.
- Greet attendees personally.
- During the workshop, relax. Move around. Make eye contact.
- Encourage participation.
- Smile. Engage your audience and request questions.
- Have some popcorn.

Getting Appointments and Following Up

Make sure to speak with everyone who attends before they leave. Shake his/her hand, and ask to visit their business. Most owners are proud of their company and would be happy to show it off.

Be sure to have your appointment calendar with you to schedule that meeting before they leave. That is your ultimate objective and **Family***Matters* is designed to provide strong motivation for people to make these appointments with you.

All attendees should receive a *Thank You* letter within a week to 10 days of your workshop. For those people who have made appointments, the *Thank You* letter gives you the opportunity to confirm a specific date and time.

For attendees who did not make an appointment, this is another opportunity to "touch" them. And be sure to enter all appropriate information in your client database. It is very important that you keep track of your prospects and maintain contact with them.

PREPARING THE ROOM

Be sure that the meeting room is prepared well in advance of your presentation.

- Arrange seating in a semi-circular or U-shaped pattern to promote discussion, if possible.
- Ensure an unobstructed view for all.
- Place a Evaluation Form at each seat.
- Include a Quick Compass at each seat.
- Supply pens/pencils. (You can purchase **Family***Matters* pens & notepads.)
- Have water and glasses available.
- **Family***Matters* popcorn bags should be filled in advance as well.

Projector

Position your projector to fill the entire screen area. You will have to determine the ideal distance, because different projectors have varying luminance and focal point parameters. Dress any loose wires for neatness and to eliminate a tripping hazard. ALWAYS connect your projector to your computer BEFORE you start your computer.

Lighting

It is important to have your screen strategically placed in an area where you have some control over the general lighting in the room. Ideally, you want to keep the lights on in the room, or dimmed. Try to keep light from shining directly on the screen. This will ensure the best picture quality.

When you have connected everything, run the program and access one of the main vignettes. While the video is running, move around the room to the view the program from all angles. Make sure that the picture's contrast and brightness is optimized. It's a good idea to watch a segment of more than one vignette as well as a portion of the Consultant videos. When you are satisfied, stop the video and return to the Welcome screen.

Sound

While checking image quality, walk around the room and listen to the audio. It should be easily heard but not overbearing. Most LCD projectors have speakers, however you may want to bring external speakers to enhance the soundtrack. If you are renting a projector always ask about the audio quality.

Always allow plenty of time to perform these checks before anyone arrives.

THE QUICK COMPASS

The **Family***Matters* Quick Compass is an exceptional tool. It was created by professionals to help family members QUICKLY AND EASILY evaluate their level of risk. And it will motivate them to take action!

Each section contains a series of simple YES/NO questions. All "NO" answers are assigned a numeric value and these numbers are written to the right of each question. If the answer is "I DON'T KNOW", that is scored the same as "NO." All "YES" answers get zero.

At the end of each module let attendees total that score, and remind them that you will NOT be collecting their Quick Compass. This is a SELF-EVALUATION booklet, so encourage them to be honest. At the end of the workshop, direct them to total their scores from the individual sections.

During any follow-up conversations, even at the end of the presentation, you'll want to review their scores with them. The Quick Compass provides a clear - and accurate - snapshot of their most critical needs .

Personalizing the Quick Compass

Since the Quick Compass is something your attendees will take with them, you must personalize the booklet. Attach an approved business card to the back.

Scores

After the five modules are completed, be sure the scores have been totaled. Give your audience a moment to do this. Before you end the workshop, you'll want to explain the "risk categories" so family members will understand how they did. Remind them that the scores are important to consider. Keep in mind, scores may vary among members of the same family. This is another clear indication that there are important issues to be resolved!

YOUR SCORE	YOUR RISK
0 – 33	Low
34 – 68	Moderate
69 – 99	Dangerous
100+	Severe

MARKETING MATERIALS

There is a wide variety of materials you can purchase to enhance your initiatives with **Family***Matters*. All items can be ordered online at **www.sellingtechnologies.com**. You can also call 215.750.9756.

Quick Compass

Brochure

Pens

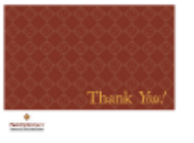
Notepads

Baseball Caps

Polo Shirts

Invitations

"Thank You" Cards



Mouse Pads

Popcorn Bags